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ABSTRACT

In order to develop a financial plan for and identify constraints on the production of distance learning materials, a total human resources development (HRD) plan must be produced, and endorsed by the highest level of management. The HRD plan sets out the human resources needed to secure the organization's future in terms of people and their skills, knowledge, and abilities. Central to the HRD plan is the development of a training needs analysis (TNA), i.e., an integrated training system in which the teaching methods and delivery media match the students and the content to provide the best possible training system for the investment made. An important permanent feature of the TNA is a Central Evaluation and Monitoring Unit (CEMU) which analyzes and monitors performance and constructs a realistic financial plan for the training function. Setting up a system of training with a built-in capacity to improve itself, based on both systemic evaluation and dialogue with trainees and managers, should make it possible to provide relevant and timely training whenever and wherever it is needed. (3 figures) (EW)

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PRODUCING DISTANCE LEARNING MATERIALS: CASH AND OTHER CONSTRAINTS

to BACIE London 2nd October 1985

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Today I want to talk about setting up a financial plan for, and identifying constraints on the production of Distance Learning Materials (DLM). Obviously we wont have time today to discuss all the possible constraints that you could face in introducing a DLM element into your training programme

The most obvious constraint on the launching of any plan, whether in training or any other sphere of business is finance, so it is perhaps appropriate to discuss this first. In the past much of the financing of training in the world of industry and commerce has been seen as a form of running expense; this attitude thankfully is now changing and it is beginning to be recognised that training is an investment in an organisations HUMAN RESOURCES, this awareness has penetrated to the highest levels, in an interview Tom King while still Secretary of State for Employment drew attention to this, and to the relative failure of UK employers to invest in training. Typically while we are content to invest around 0.15% of turnover in training, our major competitors invest around 2% to 3% of their turnover in training. They recognise that training as INVESTMENT is both correct, and essential to the survival of a profitable and efficient business, an attitude we must adopt here if training is to play its proper role in a real and lasting recovery of the UK economy.

Training as investment is especially true where a major change in the system of training such as the introduction of DLM is envisaged. The production of DLM is a classic investment decision, in which money is sunk into an activity in order to aquire assets for future use. I use the term aquire rather than make, because as you will know there are other ways of aquiring a DLM facilities than producing them in house, and the precise mix between in house and bought in parts will vary from one organisation to another, and between courses within an organisation each option having its own particular strengths and weaknesses according to the objectiives of the particular user.

In order to set up a financial plan and identify constraints on the introduction of DLM the first and most essential step is **a total HUMAN RESOURCES DEVELOPMENT PLAN which is endorsed and supported at the highest level of management.** Without this backing from the top training could easily end up shunted into the marginal position it so often occupies in large organisations,which results in a less than optimun service, to trainees, employing departments, customers, and ultimately the economy. The HRD plan should set out clearly the human resources needed to secure the organisation's future in terms of people, their skills, knowledge and abilities for the forseeable part of that future.

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HUMAN RESOURCE DEVELOPMENT PLAN
DEFINES

FUTURE STAFF REQUIREMENTS IN TERMS OF:

Numbers Skill levels

Recruitment Sources

Timescales for staff availbility

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TRAINING NEEDS ANALYSIS
SEEKS ANSWERS TO

WHAT SKILLS WILL WE NEED

What do trainees know on entry

What will they need to know

WHAT RESOURCES HAVE WE GOT

In the training system

In other parts of the organisation

WHAT SKILLS MUST WE TEACH

Who can teach these Trainers and Users

In what sequence (Timescales)

To which students

WHAT RESOURCES WILL WE NEED

Teachers/Authors

Support staff

Technicians

Equipment

Premises

HOW CAN WE ORGANISE OUR RESOURCES TO MEET THE NEW DEMANDS

WHAT NEW RESOURCES WILL WE NEED (and where from)

WHAT TIMESCALES ARE WE LOOKING AT

WHAT AR! OUR BUDGETARY REQUIREMENTS

DRAFT TRAINING PLAN

REPORT BACK TO HRD PLANNING GROUP

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Central to the HRD plan is the setting up of a TRAINING NEEDS ANALYSIS in which the demands the HRD plan will make on training are addressed and the training system is planned to provide a way forward for the organisation and its people. A word of caution is perhaps called for here, the TNA will cover not just DTM, but also other new or existing training methods. The aim must be to produce an intergrated training system, in which the teaching methods and delivery media match the students and the content to provide the best possible training system for the investment made. In this respect I would mention the OUs use of one week summer schools, computer based teaching, audio tapes,and of course radio and TV, all intergrated with the printed part of the course, and all making a valuable contribution to student learning. In the light of our experience I would strongly advise you to So look at all possible methods, and how best to integrate them.

One other important point: those responsible for the TNA should not be just trainers, it is vital that employing departments, and those responsible for R&D are involved closely. The purpose of the TNA it cannot be too heavily stressed is the provision of a training system that is relevant, on the ball and up to date! Training must be aimed at the future and the present not the past!

[TRANSPARENCY ONE]

As you will see from this transparency I have listed some of the questions that a TNA must address. First among these is a review of the HRD plan to see just what are the demands on the training system likely to be, or who do we teach what, and when. Concurrently we need to undertake a review of the existing training system in order to locate those areas where performance, including cost effectiveness can be improved, or where resources likely to become redundant in the near future can be shifted over to address new challenges. As you see their are sub questions about the kind of trainees we can expect, the sequence in which courses and modules will be required, and the resources we need to implement the training plan generated by this exercise.

You will now need to address those present or impending deficits in the training system. In order to do this, we need to know more about our future trainees, where are they coming from, and where are they going to. In other words what skills, knowledge and experience will they bring to their course, and what should they take away. This will require the TNA to look outside the organisation, at schools FE colleges, and other training schemes and educational institutions as a part of looking at training provision as a whole, in order to avoid wasteful and irrelevant duplication.

As to the financial plan, this can only follow from the TNA, once we know what needs to be done, and how we mean to do it, then, and only then can we begin to rationally cost out the required investment. At this stage we will inevitably find ourselves forced to re-examine our proposals in order that they fit the budget available. If you have done our work on the TNA thoroughly this while it might require hard thought, should not

TRAINING MANAGEMENT TEAM

MANAGEMENT RESPONSIBILITY
AND FINANCIAL CONTROL

COLLECTS DATA FROM

- TRAINING MANAGEMENT TEAM
- COURSE TEAMS (CCT-PCT-OCT)
- OPERATIONAL DEPARTMENTS
- STUDENTS
- MARKET RESEARCH
- RESEARCH AND DEVELOPMENT

CENTRAL EVALUATION AND MONITORING UNIT

REPORTS TO

- TRAINING MANAGEMENT TEAM
- COURSE TEAMS
- OPERATIONAL DEPARTMENTS
- PERSONNEL DEPARTMENT
- RESEARCH AND DEVELOPMENT
- CORPORATION STAFF
- THE WIDER TRAINING COMMUNITY

CEMU FUNCTION

TO PROVIDE

A system by which the Training Department can monitor and evaluate its performance in order to provide a capacity for continuous self-improvement.

REPORTS ON

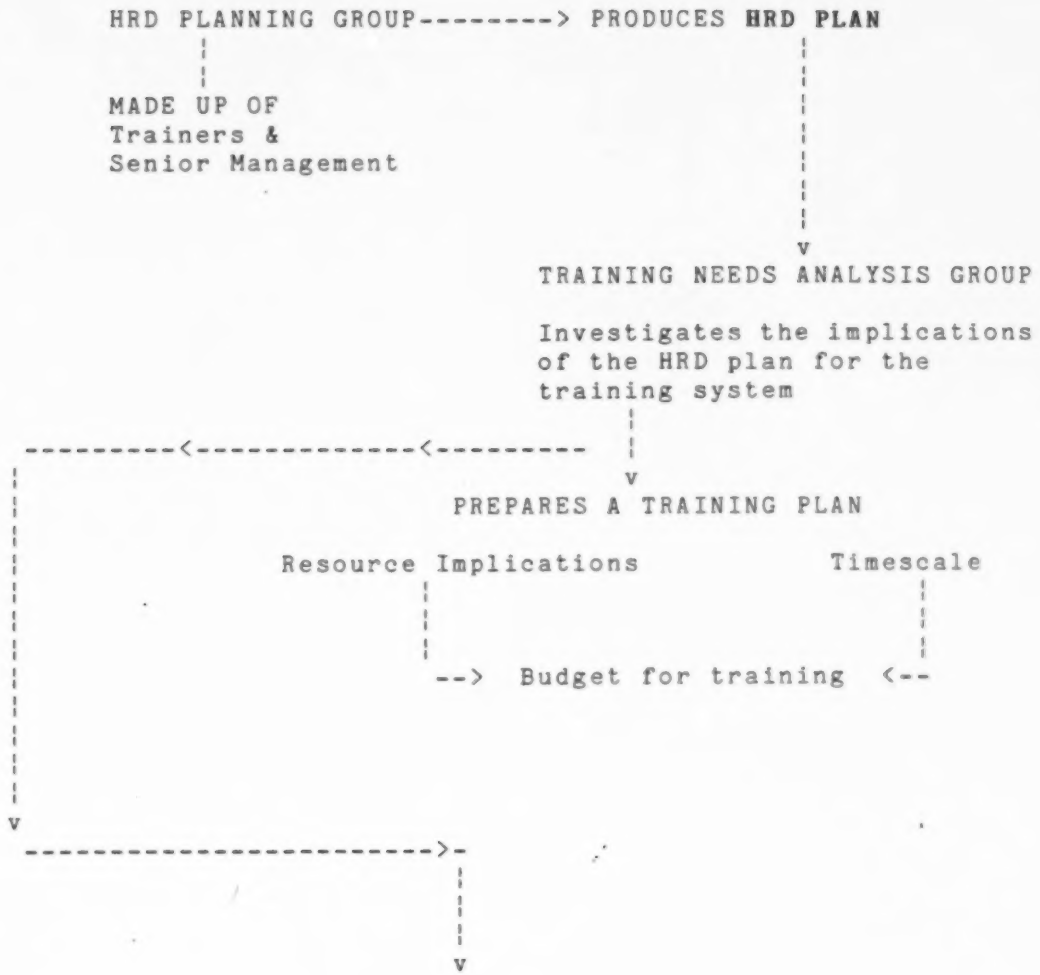
EFFECTIVENESS
EFFICIENCY
GOAL ACHIEVEMENT
INNOVATION
→ IN THE TRAINING SYSTEM

TECHNICAL CHANGE
SOCIAL CHANGE
CORPORATE POLICY
→ AS IT EFFECTS TRAINING

Such other matters which come to its notice, outside training, when the interests of the corporation, its staff or the general public are served by preparation of a report.

DW/mm/IIC/IET
12th September, 1985

SET UP



SET UP SYSTEM TO MONITOR AND IMPROVE THE TRAINING SYSTEM

Looking at:

Present cost effectiveness

Changing needs

Improvements in training techniques

cause alarm. You will be in position to point out to your colleagues outside training the implications of cuts in your budget, investment in training as in research or production must form part of a coherent plan, which cannot be subject to savings by peicemeal cuts, since these have knock on effects which over time could negate any savings, and indeed raise costs unacceptably. Now is the time that senior managements' commitment to the HRD plan becomes the key strongpoint in the trainer's negotiating position. With the knowledge of the centrality of the HRD plan to corporate progress, and the essential role of training in implementing it, you should be able to restrict changes to the negotiation of timescales and priorities between projects. In deciding proirities the dominant consideration should be the timeliness of the training, not costs. Costs are important, but should not be allowed to damage the training plan, cheeseparing on investment here will only backfire in costly remedial work later.

[TRANS 2 CEMU]

In the course of doing the TNA you will have created a capacity for the evaluation and analysis of the training system. It is important that this is seen as a permanent feature, perhaps the only permanent feature of the training system, this feature I have called the Central Evaluation and Monitoring Unit or CEMU. In a world in which technological, economic and social systems are subject to change, the ability to continually monitor and analyse the performance of training, and to initiate modification and change based on sound analysis is essential, without it you could easily fall into the trap of jumping onto bandwagons without really knowing where they are going, and consequently arriving somewhere you didn't really want to be, or simply sliding into tried and tested ways while the real world moves on! Training departments that fall into these traps will soon lose the confidence of management and trainees, and rightly so.

The job of CEMU is to monitor performance a task absolutely essential not only to the provision of good training, but also to the construction of a sensible and realistic financial plan for the training function. To perform the tasks laid on it CEMU must be involved in a dialogue at all levels of the organisation finding out what the customer needs, whether that customer is an individual seeking career development, or a manager seeking to introduce new technonlogy or techniques into the business. It will also need to look outside, at education , training, technology and social change, in order that the provision of training stays ahead of the game.

[TRANS THREE]

To summarise, the production or use of good DTM requires us to know, where we are going as a business, especially in terms of planned and projected technical and organisational changes. Where our trainees will come from, in terms of their prior skills and knowledge, and where they are going too, in terms not only of the job they enter after their initial course, but also their career development needs, and job changes dictated by the wider technical and economic enviroment.

Of course we cannot hope to project the career of a sixteen year old apprentice, or twenty two year old management trainee over thirty or forty years on his or her day of entry, but by setting up a system of training with a built in capacity to improve itself based on systemic evaluation, and dialogue with trainees and managers we can hope to have relevant and timely training available wherever and whenever they need it.

I finish with this thought, good training is costly, but nowhere near as costly as skill bottlenecks, low morale, and poor motivation can be. May I suggest an objective for all training departments, harking back to the Victorian values of Samuel Smiles; if any apprentice or junior trainee enters your company with the desire to make it to the boardroom, you as a training manager should be able to say with your hand on your heart: "We have the capacity to provide the training, they must bring only the motivation and ability."

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